

Part I: Attachments
OMB Control Number: 1820-0664
Expiration Date: 10-31-2008

Attachment 1: Basic Information

Name of Lead Agency:

Montana Department of Public Health and Human Services

Name of Applicable Division and/or Subdivision of Lead Agency:

Disability Services Division

Address of Lead Agency:

111 N. Sanders, Suite 307

P.O. Box 4210

Helena, MT 59604-4210

Name and Title of Certifying Representative for Lead Agency:

Joe Mathews, Administrator, Disability Services Division

Address for Certifying Representative:

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P.O. Box 4210

Helena, MT 59604-4210

Telephone for Certifying Representative:

406.444.2591

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jmathews@mt.gov

Name and Title of Program Director:

Barbara Varnum, Program Manager

Address for Program Director:

DPHHS

111 N. Sanders, Suite 307

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Helena, MT 59604

Telephone for Program Director:

406.444.3833

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bvarnum@mt.gov

Name and Title of Program Contact (if different from Program Director): **Not Applicable**

Name of Implementing Entity:

University of Montana Rural Institute:

Center for Excellence in Disability Education, Research, and Service

Name of Applicable Division and/or Subdivision of Implementing Entity:

Montana Assistive Technology Program (MATP)

Address of Implementing Entity:

634 Eddy Ave., CHC-009

Missoula, MT 59812

Name and Title of Program Director:

Kathleen Laurin, Program Director

Address for Program Director:

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Missoula, MT 59812

Telephone for Program Director:

406.243.5769

E-mail for Program Director:

klaurin@ruralinstitute.umt.edu

Name and Title of Program Contact (if different from Program Director): **Not Applicable**

Attachment 2: Lead Agency and Implementing Entity

2.1 Identification and Description of the Lead Agency - Identify and describe the Lead Agency referred to in section 4(c)(1)(A) of the AT Act.

2.1A Identification and Description of Lead Agency if an Implementing Entity is not Designated

Not Applicable

2.1B Identification and Description of the Lead Agency if an Implementing Entity is Designated

The lead agency is Montana Department of Public Health and Human Services: Disability Services Division, Vocational Rehabilitation Services. The Montana Department of Public Health and Human Services (DPHHS) encompasses multiple state programs whose mission is to improve and protect the health, well-being, and self-reliance of all Montanans. The Disability Services Division (DSD) directly provides or contracts for a wide variety of services that assist individuals with disabilities and/or their families. Vocational Rehabilitation Services includes Independent Living Services, and Blind and Low Vision Services.

2.2 Identification and Description of the Implementing Entity – Identify and describe the Implementing Entity referred to in section 4(c)(1)(B) of the AT Act, if such an Implementing Entity is designated by the Governor.

The University of Montana Rural Institute: Center for Excellence in Disability Education, Research, and Service (referred to hereafter as: The Rural Institute) is an interdisciplinary, university-sponsored organization promoting full participation in rural life by individuals of all ages who experience disabilities. Since 1978, it has been part of a national network of Centers for Excellence receiving core funding from the Administration on Developmental Disabilities.

Like other University Centers for Excellence, The Rural Institute organizes its efforts around four areas of activity: (1) interdisciplinary education, (2) community services and supports, (3) training and adult community services, and (4) research and evaluation. The Rural Institute represents the “bridge” between the university and community, engaging in efforts to translate research into effective practices that promote the integration and full participation of individuals with disabilities in community life. In Montana, that requires a focus on service delivery in a state with a population of less than 1 million people spread across over 147,000 square miles.

Rural service delivery issues predominate in this state. The Rural Institute's activities are grounded in a commitment to address the identified needs of persons with disabilities in Montana and other rural areas of the country. Ongoing funded projects are focused on:

- advancing the capability of rural health and human service systems so that people with disabilities who live and work in rural areas will receive appropriate, age-relevant, and culturally sensitive services to maximize their potential in inclusive settings;
- increasing opportunities for people with disabilities living in rural areas to become independent and to enhance their quality of life by taking advantage of inclusive living, education, employment, leisure, recreation, health and other normal life experiences in their communities;
- increasing the awareness of professionals, consumers, and the general public to the needs, abilities and accomplishments of persons with disabilities and to factors associated with preventing disabilities, secondary conditions, and birth defects; and
- supporting professionals and disability service providers to delivery high quality services in educational, community, and employment settings.

A significant source of pride within The Rural Institute is the number of employees who either have a disability or have immediate family members who experience disabilities. Forty percent of the staff have immediate family members who experience disabilities and 12 percent of employees have self identified as having a disability. Seventy-eight percent of Rural Institute employees are women and 6.4 percent of employees represent cultural diversity.

The Center currently administers more than 45 projects, which address the Rural Institute's mission for all age ranges and in multiple areas. Areas addressed include at least the following: American Indian Projects, Early Intervention, Family and Consumer Involvement, Health Promotion, Health Maintenance, Hearing Conservation, Inclusion, Independent Living, Personnel Preparation, Rural Rehabilitation, Self-employment, Supported Employment, Transition from School to Adult Life, and Assistive Technology.

The Rural Institute has served as the implementing agency for MonTECH, Montana's federally funded assistive technology project since 1991. MonTECH's

primary purpose has been to assist individuals with disabilities to maintain or increase their level of functioning and independence in all environments through the access to and use of assistive technology devices and services. There have been no exclusion criteria for Montanans to access and benefit from MonTECH's services. During the past fourteen years, MonTECH has developed a statewide assistive technology infrastructure available to all Montanans that includes: 1) a toll free information and referral service; 2) a short term equipment loan program; 3) a low interest financial loan program; 4) an equipment demonstration center; 5) AT training and technical service; and 6) the availability of professional AT evaluations and reports.

Over time the MonTECH name has been used synonymously with other Rural Institute AT related programs and contracts. In order to clearly identify the new Statewide AT Program funded under the Assistive Technology Act of 1998 as amended (referred to hereafter as the AT Act) and its legislative requirements and mandated activities, the Montana program will be identified as the Montana Assistive Technology Program (MATP) and the MonTECH name will continue to serve as the umbrella for all Rural Institute AT related programs and contracts.

As the implementing entity of MATP, The Rural Institute will ensure that over the next three years the program will continue to build the infrastructure described above and also begin new activities to accomplish the requirements of the AT Act. The program will continue to serve all Montanans across the life span and will have no exclusion criteria. Located in the more populated western region of the state, the program will continue to use all available strategies that will effectively address the "distance" issues characteristic of this state. The program will make its activities available statewide through the use of a toll free number, an accessible web site, and the use of other distance technologies.

MATP will employ dedicated staff with education, experience, and technical expertise in assistive technologies. The professional training and experience of current staff members includes human rehabilitation, rehabilitation counseling, special education, occupational therapy, physical therapy, speech language pathology, electrical engineering, and computer technology. Staff members work as a cohesive multidisciplinary team. This combined and complementary training and expertise positions the program to address AT needs and issues across the life span of individuals with disabilities in all environments including the areas of education, employment, community living, and telecommunications. Furthermore, program staff have ready access to specialists in other areas of service delivery at The Rural Institute, such as audiology, deaf and hard of hearing, special education,

and employment, and draw upon these areas of expertise on a frequent basis. The Rural Institute will ensure MATP staff engage in professional development activities in order to maintain relevant licensures and certifications, and to remain knowledgeable of emerging technologies and best practices.

MATP will continue to work to expand the relationships established under MonTECH. MonTECH has a fourteen year history of established relationships with public and private entities throughout the state. Rural Institute staff serve on numerous boards, advisory councils, workgroups, and committees that address the needs of individuals who experience disabilities. This interagency collaboration includes but is not limited to the Office of Public Instruction, Department of Public Health and Human Services, Vocational Rehabilitation, Independent Living, Developmental Disabilities Council, and a variety of other organizations and service providers. The MonTECH project currently has over 110 collaborative agreements with agencies throughout the state and the staff provide frequent instruction and experiences in assistive technology for University of Montana students enrolled in a variety of disciplines. The focus of these efforts and initiatives are described in more detail in Attachment 8, Coordination and Collaboration.

The Montana Assistive Technology Program will adhere to and embrace all components of consumer responsiveness as defined by the AT Act and as defined by The Rural Institute's mission and policies. The Rural Institute's mission of enhancing the independence, productivity, integration, and inclusion of individuals with disabilities and their families mirrors the defining characteristics of consumer responsiveness defined in the AT Act. In addition to this mission statement, The Rural Institute has specific written policies that also address its commitment to consumer responsiveness. Additionally, MATP will ensure it is consumer responsive through program evaluation of its performance and outcomes. Part of this program evaluation will include obtaining direct feedback from consumers and other stakeholders who access the program. The feedback, which will be obtained through interviews and surveys, will be used to guide and improve program activities. In addition, the Advisory Council (as described in Attachment 3 of this plan) will monitor program efforts.

The program will have an administrative agreement with Community Bank-Missoula to operate a portion of the alternative financing program and with the Montana Adaptive Equipment Program (MAEP) which provides device reutilization of adaptive equipment for individuals with developmental disabilities.

These activities are explained in greater detail in Attachment 5, State Level Activities.

2.3 Show of Good Cause for Change in Lead Agency or Implementing Entity – If the Governor has chosen to change the Lead Agency or, if applicable, Implementing Entity as allowed in section 4(c)(1)(C) of the AT Act, provide an explanation of good cause for this redesignation.

Not Applicable

Attachment 3: State Advisory Council

3.1 Membership of the Advisory Council - Identify the members of the Advisory Council and each member's designation as an individual with disabilities who uses AT, a family member or guardian of such individual, or a representative of a State agency or other entity.

MonTECH maintained a consumer advisory board through 2001, its first ten years of funding. Due to the anticipated sunset of the AT projects, The Rural Institute's Family and Consumer Advisory Board assumed responsibility of providing guidance to the project. Given the new requirements of the AT Act regarding structure of the advisory council, a new council has been convened. Membership is as follows:

Individual who uses AT

Individual who uses AT

Individual who uses AT and parent of individual who uses AT

Individual who uses AT

Individual who uses AT

Representative of Montana Vocational Rehabilitation

Representative of Montana Independent Living Council

Representative of Montana Work Force Investment Board

Representative of Office of Public Instruction

Not Applicable – Agency for Individuals who are Blind

The members of the council represent the state geographically and reflect the ethnic diversity of the state. Members experience a variety of disabilities and use a variety of AT devices.

3.2 Structure and Operation of the Advisory Council – Describe the structure and operations of the Advisory Council.

The Montana Assistive Technology Program Advisory Council (MATPAC) is a nine person committee, of which five members (55%) are individuals with disabilities and/or family members of individuals who use AT. As required by law, the remaining four members are representatives of state agencies. Agency representatives were appointed by their respective agency heads, while individuals with disabilities and/or family members were solicited through networks of disability organizations and councils throughout the state. It is anticipated that all members will serve a three-year term to coincide with the length of Montana's state plan.

The MATPAC will provide consumer driven and consumer responsive guidance relative to the identification, planning, and implementation of program goals and activities. The nine members of the advisory council as identified above will serve as an executive committee, led by a chairperson elected by the majority. A similarly elected vice-chair will serve in the absence of the chairperson. The council will use a consensus process. If consensus can not be reached, decisions will be made by a majority vote of the executive committee. The executive committee will write and adopt operating procedures as determined by the committee.

A variety of strategies will be utilized to support the operation and work of the Council. The Council will meet on a quarterly basis. Due to the vast distances Council members must travel as well as the challenges posed by Montana's climate and mountainous terrain, face to face meetings will be held a minimum of once per year. These meetings will be held in an accessible location that best meets the needs of the council. The remaining Council meetings will be conducted via telephone, video conference, or using MetNET, the state's compressed video network. As necessary, other informal mechanisms will be used to consult with Advisory Council members throughout the year.

The state program staff will coordinate meeting arrangements, develop materials for information packets for members, and ensure site and material accessibility. The chairperson of MATPAC and the MATP director will collaboratively set the agenda for MATPAC meetings, ensuring that Council members are informed about program, state, and national AT issues. At each meeting, MATP staff will provide updates on the activities of the program and introduce new initiatives so the Council members can provide input. The chairperson will facilitate discussion throughout the meeting to gain input and provide guidance in planning program activities. Minutes of the meeting will be taken by staff and distributed after each meeting.

It is important to note in this discussion that Montana's new Governor has made it a priority to reduce the number of advisory councils that exist in the state. New councils may be formed only if they are mandated by legislation. Due to Montana's small population (less than 1,000,000 people) numerous advisory councils are taxing on agency personnel as well as active citizens in terms of time, energy, and costs. Many active citizens and agency personnel are called upon to serve on multiple councils that address very similar issues. For example, there is a considerable overlap of individuals who serve on the Governor's Advisory Council on Disability, the Montana Vocational Rehabilitation Council, the Statewide

Independent Living Council, and the Council on Developmental Disabilities. Therefore, MATP will maintain an active advisory council as required by the AT Act, but will not seek to have a large membership. Instead, MATP will seek additional input and guidance through existing councils.

Attachment 4: Measurable Goals

MATP will establish a baseline for each of the goals 4.1 through 4.7 during year two. This baseline will be established by using a data collection instrument and procedures to be determined by RSA after the State plan process has been completed. With the advice of the Advisory Council, MATP will establish the long term goal and short-term goals for addressing the assistive technology needs of Montanans who experience disabilities in the domains of education, employment, community living, and telecommunications and information technology. After year two, MATP will submit an amendment to the state plan identifying the long term and short term goals set to improve upon this baseline during year three and subsequent years of the State Plan.

4.1 Goal for Improving Access to AT in Education

- Long-term goal: Percent (to be determined at a later date) of appropriate targeted individuals and entities who accessed device demonstration programs and/or device loan programs and made a decision about an AT device or service for educational purposes as a result of the assistance they received.

Short-term goal for Year 1: N/A data collection not established

Short-term goal for Year 2: Establish baseline of the percent of appropriate targeted individuals and entities who accessed device demonstration programs and/or device loan programs and made a decision about an AT device or service for educational purposes as a result of the assistance they received.

Short-term goal for Year 3: Increase in percentage over year 2 (to be determined at a later date) of appropriate targeted individuals and entities who accessed the device demonstration programs and/or device loan programs and made a decision about an AT device or service for educational purposes as a result of the assistance they received.

4.2 Goal for Improving Access to AT in Employment

- Long-term goal: Percent (to be determined at a later date) of appropriate targeted individuals and entities who accessed device demonstration programs and/or device loan programs and made a decision about an AT device or service for employment purposes as a result of the assistance they received.

Short-term goal for Year 1: N/A data collection not established

Short-term goal for Year 2: Establish baseline of the percent of appropriate targeted individuals and entities who accessed device demonstration programs and/or device loan programs and made a decision about an AT device or service for employment purposes as a result of the assistance they received.

Short-term goal for Year 3: Increase in percentage over year 2 (to be determined at a later date) of appropriate targeted individuals and entities who accessed the device demonstration programs and/or device loan programs and made a decision about an AT device or service for employment purposes as a result of the assistance they received.

4.3 Goal for Improving Access to AT in Community Living

- Long-term goal: Percent (to be determined at a later date) of appropriate targeted individuals and entities who accessed device demonstration programs and/or device loan programs and made a decision about an AT device or service for community living as a result of the assistance they received.

Short-term goal for Year 1: N/A data collection not established

Short-term goal for Year 2: Establish baseline of the percent of appropriate targeted individuals and entities who accessed device demonstration programs and/or device loan programs and made a decision about an AT device or service for community living as a result of the assistance they received.

Short-term goal for Year 3: Increase in percentage over year 2 (to be determined at a later date) of appropriate targeted individuals and entities who accessed the device demonstration programs and/or

device loan programs and made a decision about an AT device or service for community living as a result of the assistance they received.

4.4 Goal for Improving Access to IT and Telecommunications

- Long-term goal: Percent (to be determined at a later date) of appropriate targeted individuals and entities who accessed device demonstration programs and/or device loan programs and made a decision about an AT device or service that meets an IT/telecommunication need as a result of the assistance they received.

Short-term goal for Year 1: N/A data collection not established

Short-term goal for Year 2: Establish baseline of the percent of appropriate targeted individuals and entities who accessed device demonstration programs and/or device loan programs and made a decision about an AT device or service that meets an IT/telecommunications need as a result of the assistance they received.

Short-term goal for Year 3: Increase in percentage over year 2 (to be determined at a later date) of appropriate targeted individuals and entities who accessed the device demonstration programs and/or device loan programs and made a decision about an AT device or service that meets an IT/telecommunication need as a result of the assistance they received.

4.5 Goal for Improving Acquisition of AT in Education

- Long-term goal: Percent (to be determined at a later date) of appropriate targeted individuals and entities who obtained devices or services from State financing activities or reutilization programs for educational purposes who would not have obtained the AT device or service.

Short-term goal for Year 1: N/A data collection not established

Short-term goal for Year 2: Establish baseline of the percentage of appropriate targeted individuals and entities who obtained devices or services from State financing activities or reutilization programs for educational purposes who would not have obtained the AT device or service.

Short-term goal for Year 3: Increase in percentage over year 2 (to be determined at a later date) of appropriate targeted individuals and entities who obtained devices or services from State financing activities or reutilization programs for educational purposes who would not have obtained the AT device or service.

4.6 Goal for Improving Acquisition of AT in Employment

- Long-term goal: Percent (to be determined at a later date) of appropriate targeted individuals and entities who obtained devices or services from State financing activities or reutilization programs for employment purposes who would not have obtained the AT device or service.

Short-term goal for Year 1: N/A data collection not established

Short-term goal for Year 2: Establish baseline of the percentage of appropriate targeted individuals and entities who obtained devices or services from State financing activities or reutilization programs for employment purposes who would not have obtained the AT device or service.

Short-term goal for Year 3: Increase in percentage over year 2 (to be determined at a later date) of appropriate targeted individuals and entities who obtained devices or services from State financing activities or reutilization programs for employment purposes who would not have obtained the AT device or service.

4.7 Goal for Improving Acquisition of AT in Community Living

- Long-term goal: Percent (to be determined at a later date) of appropriate targeted individuals and entities who obtained devices or services from State financing activities or reutilization programs for community living purposes who would not have obtained the AT device or service.

Short-term goal for Year 1: N/A data collection not established

Short-term goal for Year 2: Establish baseline of the percentage of appropriate targeted individuals and entities who obtained devices or services from State financing activities or reutilization programs for community living purposes who would not have obtained the AT device or service.

Short-term goal for Year 3: Increase in percentage over year 2 (to be determined at a later date) of appropriate targeted individuals and entities who obtained devices or services from State financing activities or reutilization programs for community living who would not have obtained the AT device or service.

4.8 Additional Measurable Goals -- If applicable, describe any measurable goals that the State has set in addition to the goals established in items 4.1 through 4.7 for addressing the assistive technology needs of individuals with disabilities in the State related to education, employment, community living, and telecommunications and information technology.

Not Applicable

Attachment 5: State-level Activities

5.1 State Financing Activities – Describe how the State will implement State financing activities as described in section 4(e)(2)(A) of the AT Act.

During year one of this state plan, MATP assumed responsibility for and is building upon the existing low interest loan program established by MonTECH with Title I funds under the previous AT Act legislation. MonTECH established a low-interest loan program with the specific purpose of supporting the purchase of assistive technology by Montana individuals with disabilities or their families. The program began with a \$40,000 account. Over the past seven years, MonTECH has added to this sum, now holding a \$250,000 certificate of deposit with banking partner Community Bank-Missoula, Inc. to support low interest loans for people with unmet AT needs throughout Montana.

Funds earmarked for this activity serve as a guarantee on loans that Community Bank determines to be high risk. MATP supports the loan application process by conducting an initial screening of all applicants to determine the appropriateness of the technology to be purchased, and assisting to identify any other funding options that might not have been explored by the applicant. In considering applications, Community Bank has three options. They may: (1) fully approve a loan; (2) approve a loan contingent upon a partial guarantee by MATP; or (3) decline a loan, allowing MATP the choice to guarantee the entire amount of the loan.

Loans available through this program accrue interest at the prime rate at the time the loan is made. Loans may be requested for AT in the amount of \$500 - \$10,000, with the term of repayment not to exceed 60 months. Any AT equipment or devices for any purposes can be supported with this funding with one exception. While a loan can support vehicle modification, it cannot support the initial purchase of a vehicle.

Despite the bank's location in Missoula, the lending area for this program is the entire state of Montana. In order to accommodate applicants who live outside the Missoula area, interested persons can get information and/or begin the application process by contacting MATP via the project's toll free number, through written correspondence, and/or electronic email.

MATP staff are available to assist consumers in applying for a financial loan by helping to understand and process paperwork and helping them secure documentation or estimates of equipment costs. MATP tracks the applicants'

progress through the process, facilitating an equitable decision and timely procurement of the needed equipment.

This activity will increase acquisition of AT by Montanans because low interest loans provide a means of securing needed assistive technology by individuals who are unable to have devices funded through other avenues. This program provides an alternative for individuals who might not otherwise qualify for bank financing for reasons related to their disability (e.g., poor credit rating; insufficient credit history, etc.).

MATP is marketing its financial loan program in a number of ways to make this service available to people throughout the state. A fact sheet about the program is included in every information packet disseminated. Additionally, articles have been written for state newspapers and disability-related newsletters. MATP has posted information about the loan program on its accessible web site, and offers information and assistance through its toll-free phone number. Community Bank and its affiliates keep materials on hand to disseminate as well.

Over the three years of this state plan, MATP staff and Advisory Council members will explore ways to expand and improve this program. During year one, a review of internal loan program policies was undertaken to identify any needed changes that may help increase access to and use of the program. Program eligibility was extended to members of U.S. Armed Services and National Guard and their families who are stationed in Montana. The current agreement with the banking partner was also reviewed to identify potential changes that may increase access, including such things as renegotiation the terms or providing additional customer services to applicants (e.g., credit counseling). A comprehensive awareness campaign was also undertaken, with efforts focused on increasing awareness in remote areas of the state. Dissemination outlets include newsletters, radio and television public service announcements, websites, and other avenues suggested by staff and Advisory Council members. On-going evaluative activities will be conducted to continually examine programmatic access and effectiveness.

5.2 Device Reutilization Program – Describe how the State will implement a device reutilization program as described in section 4(e)(2)(B) of the Act.

Device reutilization activities encompassed under the State Financing component of this plan support measurable goals regarding the acquisition of AT in the areas of education, employment, and community living (Goals 4.5 – 4.7). The various

activities encompassed under reutilization (e.g., equipment exchange, repair, recycling) provide a vehicle through which equipment can be acquired by an individual who might not otherwise have the means of securing needed AT supports.

Under the previous AT Act grants, MonTECH managed a reutilization program focused on one particular segment of the statewide population of individuals with disabilities. With funding from the Disability Services Division of The Department of Public Health and Human Services, MonTECH managed and coordinated The Montana Adaptive Equipment Program (MAEP) which recycles equipment for permanent placement and also provides long term loan of equipment. As part of this program, the MAEP coordinator with support of MonTECH staff managed the pool of recycled equipment, making devices available to Montanans with developmental disabilities throughout the state. MonTECH provided assistance in professional development trainings for adaptive equipment therapists, administrative oversight, office space, device storage space, technology support, and assistance in the handling and shipping of devices. During year one, MATP provided administrative oversight, and assistance in program activities including the planning and coordination of professional development training.

MAEP's dynamic loan pool consists of new and used adaptive equipment that has been purchased or donated to the program by individuals and organizations throughout Montana. MAEP refurbishes donated equipment which can then be recycled on a permanent basis or given to participants when a long term loan is appropriate. Recipients of equipment from MAEP are encouraged to donate the equipment back to the program for refurbishing and redistribution should the individual no longer have need of the equipment. In contrast to the eclectic inventory of the MATP equipment loan bank (see Section 5.3), the MAEP equipment pool consists primarily of specialized equipment for mobility, seating, and positioning. Other durable medical equipment devices such as hospital beds and transfer boards are also available.

MAEP works directly with occupational and physical therapists, case managers, durable medical equipment suppliers, people with disabilities, and family members around the state to ensure provision of the most appropriate equipment. When needed, MAEP assists a family in locating an experienced adaptive equipment therapist to assess the program participant's level of functioning and help in identifying and obtaining specialized equipment for mobility, positioning, or other activities based on the therapist's recommendation and a physician's order.

Although this program serves individuals throughout the state, it does have exclusionary eligibility criteria in terms of who can utilize program services and resources. Participants *must* be certified as having a developmental disability by a provider funded by the Developmental Disabilities Program of The Department of Public Health and Human Services.

During year one of this plan, MATP explored ways in which to provide a statewide comprehensive reutilization program that has no exclusionary criteria and is available to all Montanans. Experience with MAEP has provided valuable lessons. The high cost and limited availability of space to store equipment, as well as issues related to liability, sanitation, and shipping shaped MATP plans to establish an online forum to support device reutilization.

During the first year of funding of this state plan, MATP identified and defined the criteria for a successful web-based device reutilization program. MATP researched existing programs and based on the needs of the state decided to build a web based program specific to Montana. With input from the advisory council, agency representatives, consumers, and family members, a database with the following features has been built.

1. Montanans, regardless of location in the state, are able to access the listing of used equipment via the Internet at any time or by calling a toll free number during office hours of operation.
2. The website site is 508 compliant to ensure access by anyone regardless of disability.
3. The site allows an individual or agency to buy, sell, or give away equipment.
4. All appropriate AT equipment is eligible for listing and the site provides multiple ways in which to search for specific devices.
5. Individual users are assigned accounts so that they can look for specific devices or place a notice that they are looking for a particular device.
6. Arrangements for exchanges are the responsibility of the parties involved.
7. The site was developed so that other community equipment recycling programs within the state can choose to be supported by the MATP infrastructure and list their equipment on the MATP site.

8. Individuals or agencies listing equipment are able to place restrictions on the use of equipment. For example, the MAEP program would be able to list equipment but its use would be restricted to eligible clients.

This system is currently being beta tested and by the end of the first year, MATP will have an operational program. Upon completion of the beta testing, MATP will conduct a comprehensive awareness campaign. The program will be publicized in newspapers, newsletters, radio and television public service announcements, websites, and other identified venues. Marketing will also include dissemination of brochures and user guides, as well as presentations at agency meetings and conferences throughout the state.

With input from the Advisory Council, specific operating procedures were defined during year one of this state plan. In subsequent years, the focus will shift to refining the reutilization program and broadening its scope through increased awareness and use. For example, MATP will work with Montana Medicare and other insurance and public assistance programs to encourage individuals who receive durable medical equipment or other AT devices to use the reutilization program when a device is no longer needed.

This web based reutilization management program will help individuals with disabilities obtain assistive technology devices by creating a statewide marketplace for equipment that is used and often free or low cost. This will provide an opportunity for individuals with disabilities to find more affordable equipment without having to meet eligibility criteria. It will be a valuable tool for agency personnel and case managers to help consumers search for and obtain equipment that may otherwise not be available to them. In addition, the identification and use of used equipment will also make it possible for programs with limited resources to extend their funds to assist more individuals.

- 5.3 Device Loan Program – Describe how the State will implement a device loan program as described in section 4(e)(2)(C) of the Act.

Since its inception as an AT Act Program in 1991, MonTECH has built and operated a short-term equipment loan program. Over the next three years, MATP will assume responsibility for and continue to maintain and operate the equipment loan program. This device loan bank will complement the program's Demonstration Center (see discussion in section 5.4) by allowing individuals with disabilities and their families to try equipment in their home, work, school, or

community environment for trial purposes. In many cases, this will occur after equipment has been demonstrated or after an individual has received an AT evaluation from MonTECH.

The current equipment loan bank inventory includes more than 1000 AT devices and computer hardware/software products that address issues associated with computer access, blind/low vision, augmentative communication, hearing limitations, learning/memory, environmental control units, aids to daily living, and mobility/positioning. Due to the prohibitive costs, liability issues, and program resources associated with the purchasing, maintenance, storage and shipping of durable medical equipment (DME) MATP maintains a limited inventory of these devices. However, MATP works to increase access to DME as noted in the plan for equipment reutilization. MATP also provides in-kind support to the Montana Adaptive Equipment Program (MAEP) which in turn provides individuals with developmental disabilities with Durable Medical Equipment and therapist services.

The device loan bank is accessible to all Montanans – individual consumers, family members and professionals – requiring only the completion of an Equipment Loan Agreement (ELA) to impart responsibility for the equipment and its return shipping. In completing the ELA, program participants are asked to respond to a series of demographic questions designed to support program efforts to account for services and ensure that the program is reaching all ages, ethnicity and manner of disability, in all regions of Montana.

MATP maintains a relationship with professionals in private practice, school, hospital and agency settings through Cooperating Agency Agreements (CAA). While individual consumers and family members may directly check out equipment from the loan bank, MATP requests that the administrator/head of a professional agency seeking to loan equipment first complete a CAA. This agreement spells out responsibilities of both entities, ensuring that all staff within the agency have loan bank privileges and that the agency assumes responsibility for the borrowed equipment. There are currently over 130 Cooperating Agency Agreements in place for the existing loan program. MATP will seek to increase the number of agency partners in the years encompassed by this Plan.

The equipment loan bank is publicized through printed program materials included in every information packet, via MATP's accessible web site, in print articles in state newspapers and newsletters, through public service announcements on radio/television, and is discussed at every demonstration, training, tour and conference in which MATP participates.

The availability of equipment on a “try before you buy” basis is a valuable resource for people who are not sure exactly what AT will meet their needs. The opportunity to try out equipment for a period of time allows individuals with disabilities, their families, and professionals to learn more about what devices will best meet their needs. It also provides an opportunity for equipment to be tried in the person’s natural environments including education, employment, home, and community. The trial use of equipment will provide valuable information and experience for individuals and enable them to make informed choices about what will best meet their needs. The equipment loan will also help consumers be aware of device related issues such as training, programming, compatibility, and maintenance. This will increase the likelihood of a good AT match and will save consumer and agency funds by reducing device abandonment. Equipment loans will also help consumers whose own device is in need of repair. Furthermore, in some instances, the MATP equipment loan program will bridge the gap between the consumers’ immediate need for assistive technology and the time it takes to acquire the assistive device through public or private financing systems.

During year one, a comprehensive inventory and barcoding of all equipment was undertaken in order to facilitate an on-line check out system. A database with a website interface was developed and is currently being beta tested. While an online equipment catalog is currently available, the new system includes improvements for online viewing of the equipment in the loan bank as well as its availability status (i.e. available; checked out; waiting list). Other new web site features allow Montanans to become registered users, be added to a waiting list for equipment not currently available, and complete a Cooperating Agency Agreement and Equipment Loan Agreement electronically. For those who either do not have internet access or prefer not to use it, MATP will continue to assist individuals to access and use the Device Loan program through its toll free number and the use of faxes or mail.

Most equipment in the MATP demonstration center (see Section 5.4) is also available for loan. However, due to copyright and licensing issues related to computer software as well as cost, risk, and durability issues related to shipping of computers, the availability of computer software for loan has been limited. During year one, MATP purchased an application server as well as additional software licenses in order to install software programs onto the application server. Equipment loan participants are able to register for limited access in order to try a particular software program through the application server. Although this effort will greatly increase access, it will still be limited to those participants who have

adequate computer/internet service. To accommodate those who do not, MATP will work with various agencies (i.e. Vocational Rehabilitation, Independent Living, local education agencies, Montana Library network) to provide computer/internet access so that individuals may try programs to evaluate their effectiveness for a particular individual and/or application.

The new system MATP has implemented contains the functionality to serve other device loan programs within the state. Other agencies and community organizations can use the MATP infrastructure to manage and list their available equipment. MATP will continue to seek ways to support a centralized web based equipment loan resource for all Montana equipment loan programs. MATP will also continue to seek input and assistance from other agencies and groups in identifying potential loan bank inventory devices that meet their needs. Finally, MATP will seek external funding support from these agencies in order to expand the loan bank inventory and better serve their consumers.

5.4 Device Demonstration Program – Describe how the State will implement a device demonstration program as described in section 4(e)(2)(D) of the Act.

MonTECH has an established demonstration site, the Montana Technology Access Center (MTAC), located at the University of Montana Rural Institute in Missoula. MTAC will serve as a device demonstration site for MATP. The facilities at MTAC include a number of display areas organized around specific applications – i.e., computer access, environmental control units, aids to daily living, augmentative and alternative communication, learning, low vision and positioning/mobility. Equipment included in these areas also encompasses supports for people who are deaf/hard of hearing, as well as phone technology and memory aids.

Individuals, agencies, or groups can contact MATP through its toll free number, U.S. mail, electronic mail, or in person to arrange for an equipment demonstration. Demonstrations are scheduled, planned, and provided on a per request basis and are coordinated to involve one or more of the professional program staff. Identification of appropriate staff involvement and the type of demonstration provided are determined by the requesting party's expressed interest and identified needs. Demonstrations are provided on an individual as well as group basis. In addition, MATP offers tours of the center for individuals, groups, agencies, and pre-service professionals.

Because Montana is largely rural, with its population concentrated in the western half of the state (where MATP and MTAC are located), individuals or groups from eastern or more frontier parts of the state must travel to access the site. MonTECH currently collaborates with professional therapists in these underserved locations to provide remote demonstration services, using MonTECH equipment and consultation. MATP will continue these efforts and work to extend its device demonstration capabilities to other regions of the state. Strategies to this include:

- 1) Further use of service professionals, who will travel to the individual or group requesting device demonstration, or provide demonstration services within existing service settings.
- 2) Collaboration with other device demonstration sites or organizations with AT equipment in other regions to support their abilities to demonstrate devices to individuals or groups in their area.
- 3) Utilize distance modalities such as web cams, videophones, Montana's Education Telecommunications Network, and other media-based solutions to allow individuals or groups with internet access to participate in device demonstrations in real time or through archived materials.

Many people seeking AT demonstration are also in need of a professional recommendation that will help them secure funding for needed equipment. In order to support the goal of acquiring AT, MonTECH continues to use MTAC to provide professional AT evaluations on a fee for service basis for individuals and agencies such as Vocational Rehabilitation, schools, and individuals who self-refer. AT evaluations differ from AT demonstrations in that demonstrations are designed to demonstrate a variety of AT devices, and provide relevant information in order to assist an individual to make informed choices. Evaluations are conducted by an interdisciplinary team of professionals, and are a planned, systematic process in which actual performance with a variety of devices is observed and assessed in order to provide an objective, experiential basis upon which a recommendation can be made. Evaluation team members may include an occupational therapist, physical therapist, speech-language pathologist, rehabilitation professional, special educator, and/or an electrical engineer/computer specialist. Evaluations include preplanning, formal written reports, implementation plans, trial periods, and follow-up. MTAC is the only source for professional AT evaluations in the state of Montana and evaluations are a much needed AT service that supports access to and acquisition of AT devices. MonTECH will continue to provide AT evaluations and MATP will provide in-kind support by making its equipment available.

Operation of this demonstration site allows individuals with disabilities, their families, students, disability-related agencies and professionals to experience a variety of AT devices while assisted by AT specialists. As with the equipment loan program, the device demonstration program assists consumers in being aware of AT device options and related issues such as training, programming, compatibility, and maintenance. Device demonstrations help empower consumers to make informed cost-effective decisions. This will increase the likelihood of a good AT match between the user and the device and decrease device abandonment, thereby saving either individual and/or agency funding.

Attachment 6: Comparable Support

This Attachment is Not Applicable

6.1 Source and Amount of Support – Identify the State-level activity for which there is comparable support, the source of this support, the amount of the support, and the project year for which this support is being provided.

6.2 Comparability -- Demonstrate that this support is comparable in terms of funding and that the activities are comparable in terms of scope.

6.3 Coordination and Collaboration – Describe how the State will coordinate activities and collaborate with the appropriate entity, if the comparable funds are provided to, or the activities are conducted by, an entity other than the Lead Agency or Implementing Entity.

Attachment 7: State Flexibility

This Attachment is Not Applicable

7.1 Activity – Identify each State-level activity the State is choosing not to carry out.

7.2 Maintenance of Statewideness and Comprehensiveness – Demonstrate that the Statewide AT Program will continue to be comprehensive without conducting this activity.

7.3 Achievement of Measurable Goals - Demonstrate that the State can reach its measurable education goals, employment goals, telecommunications and information technology goals, and community living goals without conducting such activities.

7.4 Coordination and Collaboration – Describe how the Lead Agency or Implementing Entity will coordinate activities and collaborate with entities in the State that do conduct this activity, if the State chooses not to conduct this activity because another entity already conducts it.

Attachment 8: State Leadership Activities

8.1 Training and Technical Assistance Activities – Describe how the State will provide training and technical assistance to enhance the knowledge, skills, and competencies of individuals from local settings statewide, including representatives of State and local educational agencies, other State and local agencies, early intervention programs, adult service programs, hospitals and other health care facilities, institutions of higher education and businesses as described in section 4(e)(3)(B)(i) of the AT Act.

Training

Training delivered throughout the three year period encompassed by this State Plan will address a variety of audiences and topics. MATP's plan for training is aligned with the four goal areas of this State Plan (e.g., education, employment, community living, and information technology and telecommunications). As a major component of Montana's State Leadership activities (see Attachment 11), all professional project staff will have some training responsibilities. As necessary, the project will also contract with other professionals when specialized expertise not represented among project staff is required to address state training needs.

Continuing work begun under the previous legislation, the project has developed awareness level presentations in a number of areas. More focused and customized training will be developed as requests are received and information is gathered about the specific needs of different constituencies. Due to limited program resources and the considerable expense associated with delivering training throughout Montana, MATP will charge a nominal fee to help defray travel and other expenses. Through collaborative efforts with other agencies and service providers, MATP will strive to incorporate AT trainings into existing training venues such as agency in-services and statewide conferences.

MATP will collaborate with agencies, service delivery providers, families and individuals with disabilities across Montana to identify needs and provide training in the areas of education, employment, community living, and information technology and telecommunications. Specific strategies tied to each of these areas are highlighted in the remainder of this discussion.

Education

MATP's educational training initiatives include the following topics: assistive technology supports for universal curriculum design; assistive technology supports to participate in statewide assessments; the Student, Environment, Tasks, Tools

(SETT) framework for assistive technology decision-making; integrating AT supports within the classroom; assistive technology applications within early intervention; and AT tools to support reading and writing. Other topics are available upon request. The targeted audience is educators, paraprofessionals, and other support staff. Trainings are planned and implemented through the Montana Comprehensive System of Personnel Development (CSPD) and existing conference venues such as those sponsored by the Montana Education Association and the Montana Council for Exceptional Children.

At the other end of the educational spectrum, training efforts address the needs of individuals in post-secondary education who are training to work in the education field. Project staff frequently respond to requests for training from faculty in various departments at The University of Montana. Outreach to other institutions of higher education, including Montana's Tribal Colleges, will be undertaken during years 2 and 3. For education majors training will focus on general knowledge and awareness of AT as well as AT issues related to assessment and applications within the classroom.

Employment

MATP is working closely with Montana Vocational Rehabilitation (MVR) to provide training for MVR counselors and support staff. A current priority within MVR is training in the use of AT supports for individuals who are blind and/or have low vision. Training is delivered through MVR in-services. In addition, MATP is working closely with the MVR program manager of the Native American Rehabilitation Programs in order to develop AT trainings that meet the needs of VR projects that are operated by tribal organizations.

MATP is also working to address the AT training needs of local agencies that provide employment services for individuals with disabilities. This includes agencies that deliver traditional VR supports as well as those that emphasize supported employment and self-employment services such as Montana Works. During year one, MATP provided training to workforce center Disability Navigators. During year 2, MATP will offer training to all Montana workforce one stop centers.

Finally, as noted in the discussion of Education activities, during subsequent years, MATP will seek to increase its AT training on employment topics for preservice professionals in human services, social work, and rehabilitation counseling

programs through guest lectures that will be provided either on site, via Montana's Education Telecommunication Network and/or web based training modules.

Community Living

To support individuals to live as independently as possible in the community, MATP will continue to collaborate with state and local agencies that are responsible for funding and delivering community support services. During year 1, this included the State Independent Living Council, Home and Community Based Services, Parents Let's Unite for Kids, and Family Support Specialists. During year 2, MATP will seek to provide training for the State Department of Aging Senior and Long Term Care Division of the Department of Public Health and Human Services as well as statewide groups focused on the needs of specific populations (e.g., Montana Brain Injury Association, Muscular Dystrophy Association). Training topics include but are not limited to general awareness training on the benefits of assistive technology, applications of AT use in the home and community environments, and funding sources available to help acquire assistive technology. The trainings are developed to include information on a broad array of disabilities and AT devices. For general AT awareness and applications, MATP seeks to deliver trainings in a train the trainer format. MATP will also assist the Montana Adaptive Equipment Program in the coordination and delivery of professional development trainings.

Information Technology and Telecommunications

Of all of the training areas identified, this is the area that has received the least amount of attention and resources in the previously funded AT project. As such, initial efforts will need to focus on establishing collaborative working relationships with key entities in the state. This includes programs such as the Montana Information Technology Services Department and other businesses and organizations to identify needs related to accessible information technology and telecommunications trainings. MATP will continue to work with the Montana Telecommunications Access Program to provide assistive equipment and training for people whose disabilities make it difficult for them to use a standard phone. MATP will continue to provide training on web accessibility issues and issues related to accessible voting. In addition, information related to this topic will be infused into other trainings. For example, trainings provided on education and employment will incorporate material on accessible information technology.

Additionally, MonTECH is a Microsoft Accessibility Center and provides training on computer access options in Microsoft operating systems. Trainings also include the entire continuum of computer access options. During year 2, MATP will seek to provide this training to small business and library personnel.

Technical Assistance

In each of the four areas discussed above, MATP will also be available to move beyond training to provide technical assistance. Technical assistance is the support required to transfer the application of information into effective practice. Technical assistance may also involve the delivery of expert level assistive technology work or work products such as AT related research, cost effective AT procurement, and/or AT policy and legislation development.

In accordance with the AT Act of 1998 as amended, provision of MATP technical assistance support will focus on assisting programs and agencies in improving their services, policies, and/or procedures as they relate to access to and acquisition of assistive technology. During year 2, MATP will provide assistance to the Montana Office of Public Instruction to examine the feasibility of establishing an equipment lending library for Montana schools. Other technical assistance activities will be handled on a per request basis and will be balanced with available program resources. MATP technical assistance priorities will focus on issues directly related to access to and acquisition of AT.

Transition

The AT Act requires the state AT program to either directly or through support to public and private entities, develop and disseminate training materials, conduct training, facilitate access to AT and provide technical assistance regarding transition for students with disabilities who are leaving high school for employment or post-secondary education and transition for those entering or maintaining community living.

A number of federally funded statewide transition initiatives have been implemented by the Montana Office of Public Instruction over the last ten years and much good information has been developed on the topic of transition. Product development includes a Transition Handbook, manuals on IDEA Transition Requirements, the IEP Process for Transition, and IEP Transition Planning, an IEP

Transition video, multiple brochures, flyers, checklists, and a transition survey. It is unclear at this point the extent to which assistive technology is addressed in these existing materials. During year 2, MATP will continue to review existing materials in order to determine priorities in terms of training materials that address AT in the context of transition. There are some predictable issues (e.g., equipment ownership when a student leaves the public school system; AT support systems at the post-secondary level), but other information needs have yet to be identified. Information gathering and review during year one and the first half of year two will help to focus on issues of importance that are not already addressed in existing materials. During years two and three, MATP will develop additional materials to provide assistance as it relates to AT use and issues for those students transitioning to employment or postsecondary education.

The Governor's Disability Advisory Council has recently been revised in terms of membership and mission. Previously, the council dealt primarily with issues involving the American's with Disabilities Act. The Governor has changed the mission of the council to focus primarily on transitioning individuals with disabilities from institutions into community living settings. MATP will assist the council by identifying barriers to both the access and acquisition of AT for this population including issues related to policy and funding.

MATP will continue to collaborate with other agencies on transition issues. For example, MATP is engaged in transition efforts with the Montana Job Training Partnership, Home and Community Based Services (a Medicaid waiver program) Montana Office of Public Instruction, the Montana Youth Leadership Forum, and the University of Montana Disability Services,

8.2 Public Awareness Activities – Describe how the State will provide information to targeted individuals and entities relating to the availability, benefits, appropriateness, and costs of assistive technology devices and assistive technology services as described in section 4(e)(3)(B)(ii) of the AT Act.

MATP provides information to increase awareness of the availability, benefits, appropriateness, and cost of AT devices and services by utilizing the following basic strategies:

- Operation of an information and referral network which can be accessed through the MATP's toll free number or accessible web site.

- Distribution of information about AT through multiple modalities to key stakeholder groups including utilization of the accessible MATP web site, fact sheets, publications, and device comparison charts.
- Submittal of awareness based articles on AT to be published in other agency and organization newsletters.
- Publication and distribution of an annual report on MATP activities
- Participation in local and statewide events to conduct public awareness activities across the state.
- MATP supports transition to community living by providing transition workers, employees of nursing homes and other supported living environments, family members, and consumers with disabilities, the information they need to successfully include AT in all transition planning related to community living. This is achieved through brochures and web based information on the state level activities of state financing, device reutilization, device loan, and device demonstration.

8.3 Coordination and Collaboration - Describe how the State will coordinate activities among public and private entities that are responsible for policies, procedures, or funding for the provision of assistive technology devices and assistive technology services to individuals with disabilities, service providers, and others to improve access to assistive technology devices and assistive technology services as described in section 4(e)(3)(B)(iii) of the AT Act.

As referenced throughout the previous discussion on training and technical assistance, MATP will collaborate with a full array of agencies involved in the delivery of services to individuals with any type of disability across the life span, coordinating their efforts in the delivery of assistive technology services and supports in an effort to maximize the use of limited resources. Because coordination and collaboration with public and private entities is based on opportunity and usually related to new activities and/or changing policies and procedures, it is difficult to anticipate all of the activities MATP will engage in during this contract period. During year 1, MATP coordination and collaboration activities included:

- Maintaining and expanding the network of cooperating agencies participating in the statewide equipment loan program and seeking to expand the level of agency involvement (see discussion in section 5.3).
- Promoting effective service networks for those seeking AT devices and services by assisting organizations in obtaining information and navigating the process in order to provide third-party funding of assistive technology devices and services. MATP has positive relationships with multiple agencies serving a support role in the lives of people with disabilities which includes vocational rehabilitation agencies, Medicaid Home and Community Based Waiver Teams, school districts and cooperatives, medical service providers, and community employers.
- Working with the Montana Telecommunications Access Program to increase access to and acquisition of assistive telecommunication devices and training for people whose disabilities make it difficult for them to use a standard phone.
- Coordination with Community Hospital Rehabilitation for meeting the assistive technology needs of individuals transitioning from a hospital environment back to their communities.
- Representation in professional organizations, committees and/or workgroups addressing issues related to the funding, acquisition, and effective use of AT. Current participation includes Office of Public Instruction Comprehensive System of Personnel Development Council, Office of Public Instruction AT task force, Independent Living Low Vision Services workgroup, Durable Medical Equipment workgroup, Montana School Occupational Therapy/Physical Therapy Organization, Montana Occupational Therapy Association, and the Montana Speech-Language-Hearing Association.
- Provision of AT information and services to multiple Rural Institute grant funded projects that provide training and services for individuals who experience disabilities (see discussion in Section 2.2) or visit the Rural Institute web site at <http://ruralinstitute.umt.edu> for a complete listing of projects.
- Participation in Montana's Office of Public Instruction Comprehensive System of Personnel Development Councils on the state and regional levels.

- Montana Vocational Rehabilitation - As the lead agency for MATP, collaboration with Montana Vocational Rehabilitation (MVR) is strong. The designated lead agency Program Manager for MATP also has responsibility for MVR projects that are operated by tribal organizations. This provides a critical link in building collaborations with the tribal programs. A new technology specialist position has been created within MVR to address the high technology needs of individuals who are blind or have low vision. There is close collaboration between this individual and MATP staff to develop mechanisms to provide effective problem solving and support in this highly specialized area. MATP is also working to strengthen the collaborative relationships with Montana Independent Living Services.

During year 2, MATP will continue these activities and will also engage in the following:

Montana Information Technology Services Department

MATP will seek to build a collaborative relationship with MITSD to address state issues related to information technology accessibility. During year 1, MATP provided training on the accessibility features of newly acquired voting machines for county precincts.

Montana Veterans Administration

MATP will seek to build a collaborative relationship with the Montana Veterans Administration in order to better serve the assistive technology needs of Montana veterans.

Montana Senior and Long Term Care Division

MATP will seek to increase collaboration with the Senior and Long Term Care Division to better meet the assistive technology needs of Montana's aging population.

Attachment 9: Involvement of Public and Private Entities

9.1 Nature and Extent of Resources – Describe the nature and extent of resources that will be committed by public and private collaborators to assist in accomplishing identified goals.

The Rural Institute provides substantial in-kind support for MATP which includes administrative fiscal oversight (See discussion in 11.1) for this program. It also provides office space for staff, space for MTAC which is used as MATP's demonstration center, and storage space for the Equipment Loan Bank. This space meets ADA accessibility standards and can be accessed by the local public transportation system. The Rural Institute supports a team of technology support personnel that operate and support the center's own internal network and server systems. MATP staff have available to them the technical resources and supports to implement program activities that rely on technology for implementation.

Other staff employed at the Rural Institute have expertise in areas that are of relevance to this program and provide their time as in-kind support. For example, funded projects focusing on the transition of students with disabilities are in operation, providing natural opportunities for collaboration to make AT support available to this population. Similarly, employment, personnel preparation, and health promotion projects are ongoing, creating linkages to people and systems in Montana that address these issues.

9.2 Mechanisms to Ensure Coordination - Describe the mechanisms established to ensure coordination of activities and collaboration between the implementing entity, if any, and the State.

Montana's lead agency, Montana Department of Public Health and Human Services (DPHHS) has entered into a contract with the University of Montana Rural Institute (RI) to serve as the implementing entity for the state of Montana. This contract sets forth the activities that must be conducted by The Rural Institute on behalf of DPHHS and the system of oversight required by RSA. Within DPHHS, a Program Manager within the Office of Vocational Rehabilitation is assigned to oversee the contract. This individual works directly with the MATP Program Director within The Rural Institute. The state Program Manager and RI Program Director meet a minimum of once per quarter to discuss activities and the implementation of this state plan. In addition, the Program Manager attends all Advisory Council meetings for MATP. The Office of Research and Sponsored Programs at The University of Montana submits bills detailing all expenditures to DPHHS on a monthly basis. The state's Program Manager will ensure that their fiscal unit provides timely and appropriate assistance to the RI. Finally, the RI

provides annual program and fiscal reports to DPHHS and as the implementing entity, ensures that all RSA reporting requirements are fulfilled.

9.3 Involvement of State Advisory Council - Describe the nature and extent of the involvement of the State Advisory Council in the planning, implementation, and evaluation of the activities carried out through the grant, including setting the measurable goals required in section 4(d)(3).

Advisory Council members have provided guidance about the general goals and implementation of this State Plan. As a direct result of Advisory Council input, continuation of training initiatives, agency collaborations, the device loan program, demonstration center activities, and evaluative services are included in this plan. The council meets on a quarterly basis to refine the tasks encompassed within the state level and state leadership activities. The Advisory Council will assist in defining the process that establishes a baseline for each of the goals 4.1 through 4.7 during year two of this Plan. After year two, an amended Plan identifying the long-term and short-term goals set to improve upon this baseline during subsequent years as well as any other necessary changes will be submitted to RSA. The Council will review the activities of this State Plan on a quarterly basis and will provide guidance on any necessary adjustments.

Attachment 10: State Support

10.1 State Support for State-level Activities – If applicable, describe how the State will support with State funds any State-level activities described in section 4(e)(2).

The State of Montana does not support any of the State-level activities with a direct appropriation of state dollars.

10.2 State Support for State Leadership Activities - If applicable, describe how the State will support with State funds any State Leadership activities described in section 4(e)(3), if applicable.

The State of Montana does not support any of the State Leadership activities with a direct appropriation of state dollars.

Attachment 11: Allocation and Utilization of Funds

11.1 Tracking Expenditures – Describe planned procedures for tracking expenditures for activities described in sections 4(e)(2) and (3).

There are several levels of expenditure tracking for this State Plan. At the program level, the MATP Director with assistance from the MATP Manager approves and monitors all expenditures. A coding and tracking system of all expenditures has been developed to assure MATP is in compliance with the percentages and budget amounts as mandated by the AT Act of 1998 as amended.

MATP submits all required reports and billing to the RI account managers. The Rural Institute uses a web based fiscal management system (FMS) to record and track expenditures of all RI grants and contracts. As a Center within the University of Montana, all RI grants and contracts are managed by the University's Office of Research and Sponsored Programs and Business Services. This office is also responsible for reporting to the lead agency where all budget approvals and revisions are overseen by the lead agency's (DPHHS) Program Manager.

11.2 Proposed Budget Allocations – Attach a budget containing proposed allocations for activities described in sections 4(e)(2) and (3).

The following are proposed budget allocations for State Leadership and State Level Activities for Year 2 of the project. These numbers will serve as an estimate only for Year 3 of this State Plan.

| <u>Proposed Allocation</u> | <u>Distribution</u> | <u>Amount</u> |
|-----------------------------------|----------------------------------|----------------------|
| State Level | 60% of total direct costs | \$215,106 |
| <i>State Financing</i> | <i>10%</i> | <i>\$ 21,511</i> |
| <i>Device Reutilization</i> | <i>25%</i> | <i>\$ 53,776</i> |
| <i>Device Loan</i> | <i>30%</i> | <i>\$ 64,532</i> |
| <i>Device Demonstration</i> | <i>35%</i> | <i>\$ 75,287</i> |
| State Leadership | 40% of total direct costs | \$143,404 |

| | | |
|--|------------|------------------|
| <i>Training & Technical Assist.</i> | <i>50%</i> | <i>\$ 71,702</i> |
| <i>Transition</i> | <i>5%</i> | <i>\$ 7,170</i> |
| <i>Public Awareness</i> | <i>15%</i> | <i>\$ 21,511</i> |
| <i>Coordination & Collaboration</i> | <i>30%</i> | <i>\$ 43,021</i> |
| <hr/> Direct Costs | | \$358,510 |
| Indirect Costs (8% of total direct costs) | | \$ 28,681 |
| <hr/> TOTAL AWARD | | \$387,191 |

Within the above budget, MATP proposes to apportion funds for specific activities in the described manner. However, these numbers reflect a proposal only, and will serve as an estimate only for Year 3 of this State Plan.